CRB*hub* FOR COACHING AND MENTORING
PROGRAMME MANAGEMENT SYSTEM

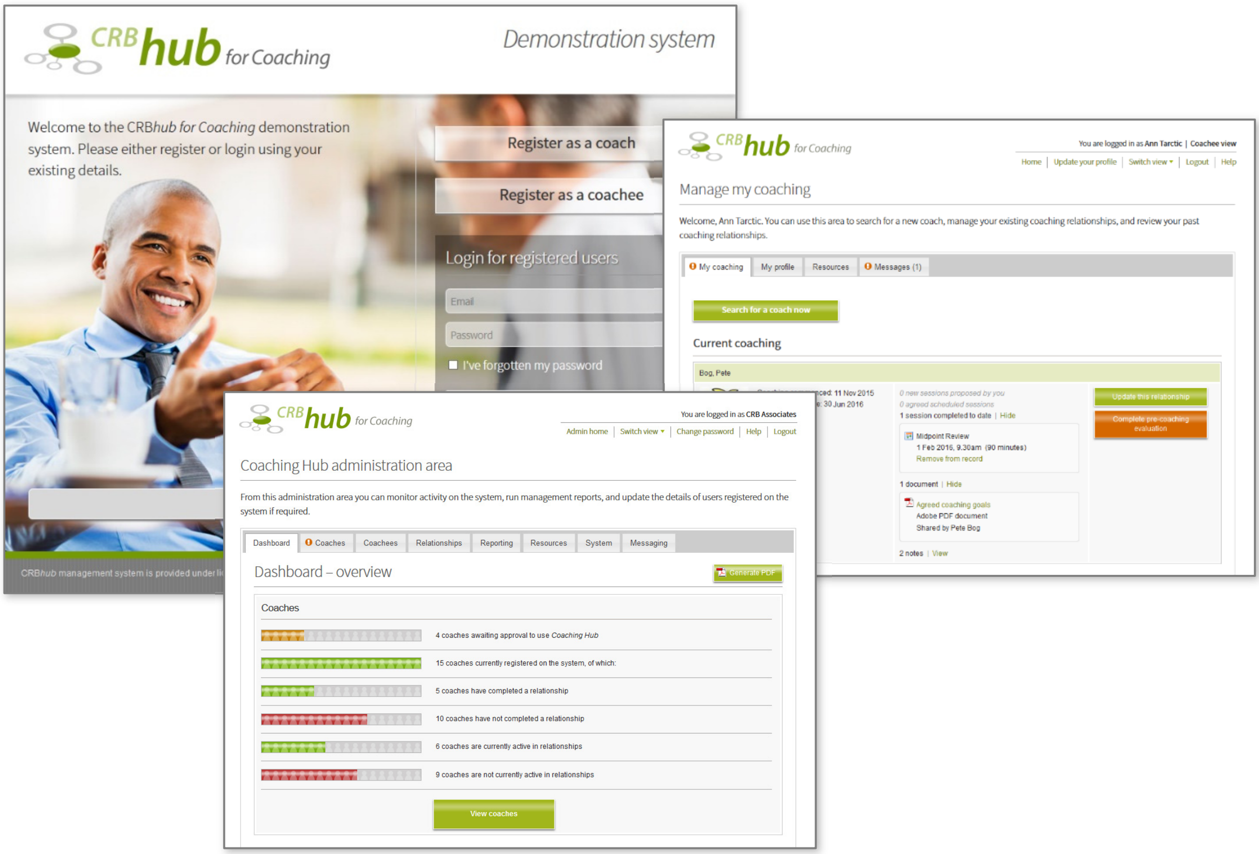
System / service definition document
May 2024

Overview

CRB*hub* is a comprehensive web-based programme facilitation and management system for coaching, mentoring, and similar interventions. The system is offered on a licensed basis, which includes resilient and secure web hosting along with friendly, responsive support from the team at CRB Associates.

CRB*hub* was designed and developed in close consultation with coaches, mentors and programme administrators working in the public, private and voluntary sectors. Since its launch, CRB*hub* has been continuously improved, and has benefited from the experience and feedback of our numerous high-profile client organisations who have been using CRB*hub* to support their coaching and mentoring programmes.

CRB*hub* provides complete support for your coaching and / or mentoring programme, whether your primary concern is ease of use for the participating individuals, or powerful aggregation of usage data to demonstrate the ongoing business benefits of your programme.



Core system features and personalisation

A standard CRB*hub* implementation consists of the current released version of the core system software, maintaining a single pool of users per service type. Certain system elements will be set or populated to meet the requirements of the commissioning organisation at the point of implementation – we refer to this as system *personalisation*.

A system may be further adapted beyond the specified personalisation elements included in a standard system implementation, in order to meet more specific or custom requirements of a commissioning organisation. We refer to this as system *customisation*.

The core system, without considering personalisation and customisation aspects, will replicate the features and functionality as shown in the product demonstration. There are three types of users on the system:

- System administrators;
- Coaches / mentors (for convenience, referred to as "**suppliers**" going forward in this document);
- Coachees / mentees (for convenience, referred to as "**clients**" going forward in this document).

An individual may be registered to any combination of user types under a single profile.

By default, administrators have full access to all administrative functionality. If the appropriate licence option has been purchased, administrators may also be assigned limited "second level" access based on a specified criterion, typically the user's organisation, region or business unit.

The core CRB*hub* system includes the following top level features:

Registration and approval processes

Every CRB*hub* system can be configured in any of the following ways around user registration and approval:

- Users may register themselves, and are then subject to approval by a system administrator before their profile becomes live;
- Users may register themselves and their profile is automatically approved;
- Users may be added by an administrator only.

Registration / approval configurations may vary by user type, so for example coachee registrations may be automatically approved while coach applications may be subject to review and approval by a system administrator.

User profiles and the matching process

User profiles within CRB*hub* are customisable, allowing user information to be defined and captured as required by the programme. This typically includes core profile information (such as staff group, grade, or department) as well as profile fields which specify what a supplier is able to provide, or what a client is seeking. Any number of profile fields may be defined, and these may be displayed in the form of either a text box, a dropdown list, a set of radio buttons, a set of checkboxes, or a slider.

The CRB*hub* system also provides the facility for a set of optional Diversity and Inclusion (equality monitoring) questions to be included within a user's profile. The answers given to these questions are never shared on an individual basis with other users or administrators, but are anonymised and used to produce aggregate D&I reporting for the programme as a whole.

Profile fields form the basis of the system's matching process. Any profile fields where a selection is made from pre-defined options (dropdowns, radio buttons, checkboxes or sliders) may be defined as search fields, and these fields are then used as factors in the algorithm used to produce a 'best match' list of suppliers for any given client. In these cases, the profile question is asked of the supplier as normal, and a corresponding 'matching preference' question is asked of the client. When searching for a supplier, a client may assign a level of importance to each of the matching criteria, ranging from "not important" to "must meet". A supplier whose responses most closely matches the client's stated preferences and the relative weightings of each will score most highly. Custom matching rules (for example, a supplier must have a grade at least two higher than the client, or both parties must be from the same department) may also be implemented if required.

A searching client may view full profile details of any supplier within their search results, in order that they may make an informed decision about which suppliers to shortlist and / or approach for a relationship.

We provide our commissioning organisations with an easy to use template to define their profile fields and identify which of those fields which will be used in the matching process.

Establishment and maintenance of user relationships

The CRB*hub* system allows relationships to be established by either of the following methods:

- a client makes a request to a supplier, and the supplier subsequently reviews then accepts the request;
- an administrator assigns a relationship directly to a specified supplier and client pair.

Each relationship may be assigned an expected end date at the point at which it is established. Once established, a relationship may continue to be updated as follows:

- Either participant may propose session dates/times which may be accepted or declined by the other participant, and may be subsequently cancelled if required by either participant. Confirmed future sessions may be saved to a user's Outlook calendar. Past sessions may also be logged. Logged sessions are used to automatically track a supplier's total coaching hours;
- Either participant may contribute at any point to the relationship journal, which is a shared log of comments and notes made throughout the relationship, beginning with the client's initial request statement where appropriate;
- Documents may be uploaded by either participant, either for sharing (in which case they are made available to the other participant) or for their own reference (in which case they are kept private). In view of the confidential nature of a coaching / mentoring relationship, uploaded documents are only ever made available to the appropriate supplier and/or clients, and are never made available to system administrators or other third parties;
- The supplier or an administrator may update the expected end date of the relationship;
- The supplier or an administrator may flag the relationship as completed (if sessions have been logged) or cancelled (if no sessions have been logged). If the relationship is flagged as completed, the post-relationship evaluation process is triggered at this point (if in use).

Specific elements of the relationship management (e.g. whether a session must be accepted by the counterpart in order to count towards a supplier's coaching / mentoring hours) can be configured as required during system implementation.

Evaluation feedback gathering

The CRB*hub* system allows evaluation feedback to be collected from relationship participants at any number of stages, as required. Common evaluation trigger points are at the start of a relationship; mid-relationship (based on the expected end date, or after a specified number of sessions have been attended); upon completion of a relationship; and after a specified period of time post-relationship. At each stage, evaluation feedback may be gathered from the client, the supplier and/or nominated third parties (typically managers or sponsors).

Evaluation questions are specified as part of the system personalisation process, and at each stage may include both benchmarking / ranking questions (where responses are given on a sliding scale for comparison purposes), and free text questions specific to each stage, to inform the supplier and to provide administrators with qualitative information. This feedback may relate to the client's knowledge / skills etc before and after the relationship, as well as to the experience in general.

Where third parties are nominated and requested to provide evaluation feedback, they are sent a one-time code via email in order to access their evaluation form. In order to expedite the evaluation gathering process, a commissioning organisation may opt for other user types to also be sent a one-time code in order to quickly access their evaluation forms without needing to fully log in to their system accounts.

Additional information regarding the evaluation process can be found in Appendix A.

Reminders and alerts

Email alerts are generated by the CRB*hub* system in real-time when any of the following occur:

- a user profile is registered or approved
- a password is reset
- a relationship is requested, started, completed or cancelled
- one or more sessions, notes or documents is added / shared within a relationship
- evaluation feedback for a relationship is required from a supplier or client.

In addition, the following optional automated email notifications may be generated daily by the CRB*hub* system, prompting action from users where an expected action has not been carried out within timeframes agreed with the commissioning organisation:

- clients applying for a coaching / mentoring relationship
- suppliers responding to a request for a relationship
- proposing / logging sessions in an ongoing relationship
- confirming session attendance
- submitting evaluation feedback for a relationship
- providing consent for the storage and processing of a user's personal information.

A commissioning organisation may select which of the available alerts they wish to use for their particular system implementation.

Management of registered users

System administrators maintain full control of the register of suppliers and clients via the administration console, with the ability to search or filter each list by user status, as follows:

- suppliers / clients awaiting approval / approved / hidden / deactivated;

- suppliers / clients who do / do not currently have a live relationship;
- suppliers / clients who have / have not completed at least one relationship;
- any combination of the above.

Administrators may update any user's profile information at any time, and may also assign them a new password if required.

If second level administrators are assigned, they will typically be linked to a specified organisation, and such administrators are restricted to viewing / editing only users and relationships related to their organisation.

Suppliers may elect to hide their profile from appearing in clients' search results (for instance a known period of unavailability), and administrators may also hide a supplier's profile on their behalf. In this case the supplier may continue to log into the system and view / update their profile, relationships and access other features, such as resources, as normal.

Alternatively, an administrator may remove a supplier or client from the register, for example if they have left the organisation. In these cases, the user would no longer be able to log into the system, but all of their previous relationship activity will remain logged for the purposes of historical reporting and statistics.

Relationships may be managed by administrators in a similar manner. A list of relationships displayed in the administrative console may be filtered by relationship status (outstanding requests, current relationships, completed relationships and cancelled / declined relationships) and may be paged, sorted or searched by supplier or client name. An administrator may carry out any of the following actions / updates on a relationship:

- change the expected end date
- schedule or log new sessions / remove existing ones
- complete or cancel the relationship
- view any evaluation that has been submitted for the relationship.

Administrative reporting

The administrative console contains a number of tools which provide access to system usage data at varying degrees of detail.

A top level 'dashboard' provides a real time overview of the system activity, which can be exported to PDF for instant top level management reporting.

Within a dedicated reporting area, administrators can generate a number of reports regarding system usage, relationship activity and evaluation, including:

- Snapshot trends report, showing levels of supplier offerings vs client demand;
- Engagement summary report, detailing system activity between two specified points in time;
- Evaluation summary report, providing a clear measure of improvement between evaluation points;
- Diversity and inclusion (D&I) monitoring report, which aggregates anonymised user data.

Additionally, administrators may download full details of relationships / suppliers / clients to CSV (Excel) format for offline analysis. These downloads exclude information which is confidential to individual users, namely users' passwords, any supplied D&I information, and confidential relationship notes and documents.

For systems which utilise second level administrators, all reporting and information available to download by a second level administrator is restricted to users who meet the administrator's specified access criteria, and their associated relationships.

Further information regarding the standard available reporting can be found in Appendix B.

Additional features

There are a number of optional features available within the CRB*hub* system which provide additional benefits to both users and administrators, and can help to incentivise users to log into their system accounts more regularly, thereby improving engagement and ultimately outcomes:

Secure messaging

System administrators may compose and send out communications to other system users via the messaging module. This module allows administrators to quickly and easily generate recipient lists by specifying one or more criteria, e.g. all suppliers who have completed at least one relationship but are not currently in a live relationship. Alternatively, administrators may choose to target a communication at specific users.

When a message is sent, an email alert is also generated, which prompts the recipient user to log into their system account in order to view the full message and supporting documents which the administrator may have made available. If the message is not considered sensitive, then the administrator may choose to include the body of the message in the email alert itself.

Users may reply to any messages that have been sent out from an administrator.

Resources

System administrators may make any number of categorised resources available to suppliers / clients. Users may view these resources once logged in and can optionally submit their own resources to be included, subject to administrator approval.

Additional activity

Suppliers may record and report on their CPD and supervision activities; if required these activities, combined with recorded sessions can be used to assign internal "levels" (e.g. gold, silver and bronze) to suppliers. Administrators may run reports to quickly determine which suppliers have or have not recently recorded CPD or supervision activity on the system.

Cohorts module

The cohorts module is optionally available at an additional cost, and includes the following extended functionality:

Administration cohort management

- From within the system's administrative console, authorised administrators can add new cohorts specifying:
  - the name of the cohort;
  - start and end dates of the cohort, if applicable;
  - whether relationships within the cohort should automatically be completed at the end of the cohort
  - (if applicable);
  - whether suppliers and / or clients may self-assign to the cohort when registering / updating their profile, or whether only administrators may assign users to the cohort;

- whether the cohort is "searchable", i.e. where coachees may search for a coach and request a relationship;
- if a cohort is non-searchable, only administrators may assign relationships;
- whether evaluation will be applied to relationships in the cohort (please note, this would comprise the agreed evaluation schedule that is in effect system-wise, unless custom additional arrangements are made).

- A summary area within the system's administrative console will show a list of the existing cohorts and the number of suppliers, clients and relationships currently assigned to each cohort.
- Authorised administrators can select to end / archive a cohort at any time; at this point any existing relationships can continue to be managed until the natural conclusion of the relationship, but no new relationships may be assigned to the cohort.
- Administrators can filter the relationships tab to show only those relationships where both parties belong to a specific cohort, or choose to filter relevant reports by a selected cohort.
- Any coach, coachee and relationship CSV downloads that an administrator generates will include cohort information where relevant, and whether the user is restricted to the cohort(s) only or can access/appear within the wider pool.

Assigning users to cohorts

- When adding / editing a user (supplier or client) profile, authorised administrators can select to assign them to one or more of the currently running cohorts; where a user has previously been assigned to an archived cohort, this will also be displayed on their profile.
- For supplier profiles, administrators can specify if the supplier should only display in search results for cohort-specific clients, or to any clients; suppliers may also update this selection via their profile.
- For client profiles, administrators can specify if the client can only see cohort-specific suppliers within search results, or if they can view /select suppliers from the wider pool. Clients may not update this selection themselves.
- Self-registering clients may indicate if they are on a cohort and this information will be included in the notification to an administrator; this is for information only and when reviewing / updating the profile an administrator must choose whether or not to assign the client to the preferred or other cohort(s).

The search and match process within cohorts

- Where clients have profile permissions to select both from a pool of cohort suppliers and from the wider pool, search results will be ordered so that suppliers who belong to one or more of the client's cohorts are listed first, in order of best match with flags indicating the relevant cohort(s), followed by non-cohort suppliers, also in order of best match.
- When a client is requesting a relationship with a supplier where they are in more than one common cohort, the client must specify which of the applicable cohorts the request relates to.

Administrators assigning relationships with cohorts

- For administrators searching for a match on behalf of a client who is a cohort member and is limited to searching within their cohort(s), only suppliers who are part of the relevant client cohort(s) will be listed in the 'best matches' shortlist, but administrators may still assign any other supplier by manually specifying them by name.
- Where both supplier and client are members of the same multiple cohorts, the administrator must select the cohort to which the relationship is to be assigned.

Cohort relationship management

- Relationships assigned to a cohort will be managed in the same way as non-cohort relationship, with session management, notes and document sharing all available.
- Where relationships are listed on a user's home page, any cohort relationships will be indicated as such.
- If a supplier or client is de-selected from a cohort, any cohort relationships they have will remain assigned to the cohort for the duration of that relationship.

Branding and user interface

The initial implementation cost includes branding of the system in line with a commissioning organisation's existing website, intranet or other branded material as may be specified.

Ease of use is essential in ensuring the successful take-up of and continuing engagement with a system, and since our CRB*hub* system first rolled out to clients in 2010 we have received consistently positive feedback about its simple, clear and intuitive user interface. From the top level organisation and navigation of the system down to the design and layout of individual forms and reports, and the intelligent use of filters and conditional display of data, we strive to ensure that the system's user interface retains its clarity and consistency so that users feel welcomed and not daunted when using it.

CRB*hub*'s user interface has been developed to adapt responsively for a user's device, whether that be a desktop or laptop computer, a tablet, or a mobile phone. While some of the more detailed administrative functions (such as reporting) are inherently not suited to a small phone display, an end user may carry out their end-to-end experience entirely on their phone if they wish, with the user interface fully optimised for this.

The CRB*hub* responsive user interface is based on the open Bootstrap CSS framework, which has become a standard in UI in recent years, and therefore ensures a consistency and a level of familiarity to end users. Systems are built in standards-compliant HTML5 code acheving a minimum W3C accessibility rating of 'AA', ensuring compatibility with current assistive technologies.

Additional system customisation

The CRB*hub* system may be further customised to meet the specific requirements of the commissioning organisation's coaching / mentoring programme, both as part of the initial implementation and on an ongoing basis as the programme evolves.

Any required customisation will be subject to an individual quotation which will be added to the initial system implementation cost. A significant amount of system customisation may also increase the ongoing annual licensing fee, reflecting the additional complexity of maintaining the system in these cases. We will advise the commissioning organisation of any such increase within our quotation.

If any specific features are required which were not present in the product demonstration, these must be brought to our attention prior to quotation, in order that they can be costed appropriately and included in the accompanying quotation document. Any features not present in either the product demonstration or the quotation document will not be included in the system implementation unless specified.

System security and data protection

In view of the inherently confidential nature of coaching and mentoring, we have always taken the security of our systems extremely seriously, and consider that we have adopted a 'privacy by design' approach from the outset. Our commitment to security and data protection is demonstrated by our Cyber Essentials and IASME Governance (GDPR) accreditation, which is renewed annually.

User accounts are employed to restrict access to the CRB*hub* system. Typically users are assigned a role of supplier, client or administrator (but can be assigned more than one user type), and are required to enter their email address and password in order to progress from the landing web page into the system proper. This security mechanism is maintained regardless of whether a user is using a traditional computer, tablet or mobile device to access the system.

Once logged in, their view of the system is tailored to the user's principal role, and appropriately restricted so that only the information and functionality relevant to the assigned role is made available. Users who are registered to multiple user types may switch between these views at any time, at which point the information displayed is appropriately updated / restricted.

Passwords may be changed by a user at any time, and the system can be set to force a password change by a user after a specified period of time or after a certain event. For example, if an administrator reset a users's password, their new password would be sent to them in an automated email alert, and for security purposes you may wish to force a password update when the user next logged in.

Passwords are also required to adhere to strength rules which may be customised to match the commissioning organisation's existing password strength rules; by default, passwords are required to be at least eight characters long and to contain at least one upper case letter, one lower case letter and one numeral.

In the event of identified misuse, any user's account may be revoked by an authorised administrator or upon request to us. Under most circumstances, any changes made by misuse will be reversible, either by a manual database intervention or by restoration from recent system backups.

As detailed above relationship documents and any documents relating to individual CPD / Supervision activity are strictly available to the relevant party (or parties in the case of shared relationship documents), and all document files are stored outside of the accessible web root. Subject to agreement with the commissioning organisation, such documents are also deleted upon a user's deactivation / when deemed no longer necessary for historical purposes.

Data security (GDPR)

The General Data Protection Regulation (GDPR) has been in effect since 2018. To comply with the GDPR directive of demonstrating a legal basis for personal data processing, and to assist with the management of data subject requests, the CRB*hub* system now includes the following functionality as standard:

- requires all users to give their consent for their personal information to be stored and processed by the system (unless the commissioning organisation confirms that a different legal basis has already been met for the storage and processing of users' personal data, e.g. contractual performance);
- automatically removes an agreed set of personal / profile information when a user's profile is deactivated;
- allows administrators to permanently erase all personal information for any specified user upon request (allowing a user to invoke their 'right to erasure').

The Data Controller and Data Processor are jointly responsible for ensuring that the GDPR principles are applied and upheld. In our capacity as Data Processor, we provide our recommendation to the commissioning organisation (the Data Controller) regarding which fields and documents should be deleted as part of the user deactivation or erasure process.

If the commissioning organisation wishes to alter or omit the consent and / or deletion aspects of the system on the basis that these requirements are fulfilled elsewhere (e.g. by a contract of employment), they may choose to do so.

Infrastructure security

All CRB*hub* implementations are hosted on our own dedicated physical or cloud-based servers, which are supplied and managed by our carefully selected hosting partner companies. Our dedicated web servers:

- are based only in secure, ISO 27001-accredited datacentres within the UK;
- are configured using RAID1 to minimise any downtime or data loss due to component failure;
- employ full disk encryption (encryption of data at rest);
- utililse networks running at below 50% capacity as standard, providing sufficient redundancy to ensure business-class response time performance, and providing a 99.9% minimum uptime guarantee (except where agreed for scheduled maintenance);
- are continuously monitored for intrusion detection, with regular health checks and OS-level and web server-level hardening/patches applied as required.

Daily encrypted backups are taken from all our hosted systems, which are then stored at a different datacentre facility, also within the UK. Backups are rotated, with the oldest backups regularly being overwritten to ensure that information is not retained longer than necessary. As part of our security policy we also carry out regular backup restore tests.

All CRB*hub* systems are equipped with SSL certificates, ensuring that data are encrypted to at least 128-bit level during transfer. We employ a combination of password protection, IP whitelisting and key-based SSH access to prevent any unauthorised access to our system back ends. All user passwords are stored in hashed (irreversibly encrypted) form, while all other non-confidential system data may be provided to authorised individuals upon request.

In order to maintain an ongoing secure infrastructure, it is occasionally necessary to schedule a short period of downtime in order to migrate systems to new servers or carry out other required maintenance. In these cases, a mutually acceptable maintenance window is agreed, out of business hours when possible. For systems for which the commissioning organisation has elected to provide certain services (e.g. DNS / name servers), such maintenance operations will require the co-operation of the relevant teams, but we will liaise with them in order to ensure minimal disruption to service.

We believe that the infrastructure specification set out above is suitable and proportionate for the nature and cost of the service offered. We recognise that some commissioning organisations will have more rigorous information security requirements (for example, around the area of penetration testing), and encourage commissioning organisations to advise us of these where they exist, in order that they can be taken into account when costing the project, since any security / infrastructure requirement not set out above will not be included in the quoted cost by default.

Implementation, billing and delivery timescales

In addition to the standard system personalisation detailed above, the initial system implementation fee also includes:

- Product licensing for one year from launch (see *System licensing*, below) with the following variances:
  - Up to two detailed system training sessions for administrators, delivered via Teams / online conferencing
  - 5 x day2day credits for funding minor system amendments or enhancements during the course of the initial licensing period (these credits expire if not used by the end of the licensing period; additional credits may also be purchased to fund further ad hoc enhancements if required). More information on day2day credits can be found in Appendix C.

- Importing of a set of existing supplier / client / relationship data, if required, to be supplied in a standard format (e.g. Excel / CSV). The data can either be imported to the test site for initial review, or directly to the live system upon launch. Standard e-mail notifications can be automatically sent to imported users, containing a welcome message and their personal login details for the system, if required;

Billing takes the form of an initial implementation fee which also includes the first year of product licensing, followed by an annual licensing fee which applies from year two onwards, payable by the start of the licensing term.

We require an official purchase order document or equivalent formal commitment to purchase from an authorised signatory before the process of system delivery can begin, and we will agree delivery timescales based on the level of personalistion and any customisation. Any delay in receipt of a formal commitment to purchase notification may incur a subsequent delay in delivery of the system.

The review period will begin at the point at which a password-protected test system is made available to the client for review purposes. The test site will be identical to what will eventually be made available on the live system in terms of functionality and personalisation, except where a commissioning organisation has not provided us with the requested personalisation information, in which case placeholder information may be used. A maximum of six weeks will then be made available for the commissioning organisation to review the test system, provide any outstanding personalisation information and, if required, populate the test system with live data to be transferred to the live system upon launch.

The latest point at which our invoice for initial implementation will be issued is at the point of provision of the test system. The first year's licensing period will commence upon the system go-live date, or six weeks after the start of the review period, whichever is sooner. The first annual licensing payment will be invoiced shortly prior to the anniversary of this date. Invoices are issued subject to our standard payment terms.

System licensing

Licensing of the CRB*hub* system provides the following ongoing benefits:

- Usage rights for up to 10,000 system users at any time, within the agreed scope of the system;
- System hosting on secure managed servers as detailed in the 'infrastructure security' section, above;
- Implementation of occasional code updates to ensure ongoing security and compatibility with current web browsers;
- Up to three system training sessions for administrators per annual licensing period, if required, delivered via Teams / online conferencing;
- Telephone and e-mail support for registered system administrators during UK office hours (please note that our standard support does not include providing operational administrative duties or providing support / documentation for subscribing third party organisations);
- 3 x day2day credits for funding minor system amendments or enhancements during the course of the licensing period (these credits expire if not used by the end of the licensing period; additional credits may also be purchased to fund further ad hoc enhancements if required). More information on day2day credits can be found in Appendix C.

Offboarding and data ownership

The CRB*hub* system is made available on a licensed basis, the intellectual property (IP) ownership of which remains with CRB Associates. All data held within the system relating to users and their relationships are the property of the commissioning organisation.

Should a client not wish to renew their licensing agreement upon expiry of an annual licensing term, we will make arrangements with them to provide their data in a machine-readable format, if required, and to decommission their system in an orderly manner. In accordance with our obligations under the GDPR, client data are deleted from our systems and servers and so are no longer retrievable following system decommissioning.

A commissioning organisation may choose to decommission their system at any time during a licensing period; however, refunds will not be made for any outstanding part of a paid licensing period not used as a result of the client's decision to terminate the service.

Company information

CRB*hub* is a registered trade mark of CRB Associates Ltd, a limited company registered in England and Wales (registered number 3872580).

For further information or to discuss your requirements in more detail please contact us at info@crbhub.com.

Appendix A: Core CRB*hub* for Coaching / Mentoring Evaluation

The evaluation feature within the core CRB*hub* system may be personalised to include any number of stages, for example at the start of a relationship, part way through the relationship, upon completion of the relationship and at a set period of time after the relationship has finished; clients, suppliers and nominated third parties may be asked to contribute to the evaluation process. The example below outlines four stages commonly used on implementations of the CRB*hub* system:

Clients are requested to complete an evaluation prior to a relationship commencing ('pre'), part way through the relationship, immediately after a relationship has been completed ('post') and at a set time (e.g. 6 months) after the completion of a relationship ('follow up').

Suppliers are also requested to submit their evaluation part way through the relationship and once a relationship has been completed, and clients have the option to invite third party users (e.g. a manager or colleagues) to give their feedback on the impact of the relationship at various stage.

The multi-stage evaluation process allows administrators to view and report on the aggregated impact and value of coaching / mentoring and provides comparative feedback for client knowledge / skills / attitudes before, during and after taking up a relationship. To achieve this, each of the forms contains a consistent set of questions for benchmarking purposes. These questions are displayed in a format that allows user responses to be ranked on a scale of 1 to 5 / 1 to 10 and reported on accordingly. If third party evaluation is included, third parties may also be asked to rank the client against each of the benchmarking questions. Each stage can also include questions specific to that stage.

The questions asked at each stage / of each user type can entirely be personalised by the commissioning organisation, within the following formats:

- A slider based on a scale of 1 to 5 / 1 to 10
- Up to 10 radio buttons (where users choose only one response)
- Up to 10 checkboxes (where users can tick all that apply)
- A dropdown list of options
- A text area

Whenever an evaluation questionnaire is triggered throughout the relationship, the relevant notifications are sent to the users; this may be a standalone e-mail or included as part of other communications, for example at the start or completion of a relationship.

'Pre' evaluation

This is typically triggered when the relationship is established or after the first session has been completed. In addition to the benchmarking questions, the 'pre' evaluation questionnaire may include questions around the client's expectations, requirements, concerns etc.

When logged in, a client can access the evaluation questionnaire via a link on their 'home' page and can be restricted in availability, for example up to the point that the client has had two sessions. When completing this questionnaire, the client is given the opportunity to invite up to three people to provide feedback at the relevant stages. Once the evaluation is submitted, if it has been shared with the supplier, a link will appear on the supplier's home page to allow them to view the responses. If a third party "pre" evaluation is included the nominated parties will also be sent details of how to complete a questionnaire.

'Mid' evaluation

This can be triggered during the relationship based on time or number of sessions, and typically includes questionnaires for both the client and the supplier. Both parties are asked to evaluate the relationship to date, and the client form can also include the benchmarking questions.

‘Post’ evaluation

Once the relationship is flagged as completed both parties can have a link to complete their post-relationship evaluation on their home page. In the case where a supplier completes the relationship, they will automatically be redirected to the evaluation form and the client will be sent an automatic e-mail notification requesting that they log in and submit their ‘post’ evaluation form; in the case where an administrator completes the relationships, e-mail notifications are sent to both the supplier and the client. If third party evaluation is included, notifications will also be sent to the nominated third parties.

In addition to the benchmarking questions, this post-relationship feedback form may also include some questions about the coaching / mentoring experience and the users’ experience of CRB*hub* system. Suppliers and clients can choose whether or not to share their feedback with the other party.

The post-relationship evaluation questionnaires can remain available to the users for a specified time (e.g. one month) after it was triggered.

‘Follow up’ evaluation

After a set period (e.g. three / six months) from the completion of a relationship, a client is sent an automated e-mail notification requesting that they log in to complete and submit their follow-up evaluation. In addition to the benchmarking questions, this questionnaire may include further questions relating to the overall experience and questions regarding the on-going impact that the coaching / mentoring has had.

If applicable, at this stage any nominated third party users may also be sent an e-mail with login details to complete the questionnaire.

For each stage of evaluation, if no feedback has been submitted within two weeks of the original request, a reminder e-mail will be sent to the user. If an evaluation request has expired without being completed an administrator may trigger a re-request for this evaluation.

Evaluation reporting

Suppliers and clients can view a PDF report of their submitted feedback, and any shared information. Administrators can also view all feedback for each individual relationship and can generate reports with aggregate / average responses for relationships completed within a specified timeframe; the aggregate report can also be generated for an individual supplier if required.

Appendix B: Core CRB*hub* for Coaching reporting functionality

As standard, CRB*hub* includes the set of core reports detailed below:

Summary activity report

A report where administrators can select a date range and view results for the following:

- The number of new client registrations
- The number of newly approved clients
- The number of deleted clients
- The positive or negative change in the total number of clients
- The number of new supplier registrations
- The number of newly approved suppliers
- The number of deleted suppliers
- The positive or negative change in the total number of suppliers
- The number of requests for relationships
- The number of clients held on a waiting list
- The number of relationships that have commenced
- The number of relationships that have been completed

Summary report of trends across user criteria such as outcomes and logistics

In this case no date range would apply and results would be in 'real-time' whenever the report was generated. The report will list all matching criteria (questions and available responses), with a summary of the number of clients who have checked each of these in their profile, against the total current supplier availability. For example outcomes requested by clients, and those offered by available suppliers.

This report will allow administrators to spot organisational trends and possible gaps in supplier resource / experience relative to the client requirements.

Detailed snapshot report

This allows administrators to build their own report choosing from the following criteria listed below, which then returns a full list of users who meet the specified criteria:

- Approved suppliers / clients or both
- Currently in / not in a relationship
- Have completed at least one relationship
- Have never had a coaching / mentoring relationship
- Currently at / not at full capacity (suppliers only)

This report can be generated either for 'real time' or a specified date in the past.

Session activity report

This allows administrators to view the number of sessions which have taken place and / or been cancelled within a specified period of time. For each relationship included in the report, the supplier and client details are displayed, along with the number of sessions and hours for that relationship within the relevant timeframe.

CPD and supervision reporting

This allows administrators to view CPD and Supervision which have been logged as having taken place within a specified period of time; each record will display the name of the event or the supervisor, the participating supplier and the date it took place.

Evaluation summary report

In addition to being able to view the full report for any individual relationship, administrators will also have the option to build a report on average responses to any quantitative questions (for example sliding scales, radio buttons and checkboxes), for responses submitted within a specified timescale. This report will show the number of responses included, the percentage of users who gave each response option and where applicable the average response given to a question. This report can also be generated for an individual supplier only if required.

Diversity and inclusion (equality) monitoring reporting

If D&I is in use, two reports will be available to administrators: the first allows administrators to view relationships where each of the D&I criteria (including age, gender and ethnicity) is the same / different for the two parties and the second report displays aggregated data for the number of users who have specified each option within the sets of criteria.

For each of the reports detailed above, administrators will have the option to generate and save / print an electronic version in a user-friendly format.

Custom reporting

We recognise the organisations will often have specific reporting requirements which may not be fully met by the standard set of reports as described above. Prior to commissioning, we discuss these requirements with each commissioning organisation, and then advise on whether the required changes can be absorbed into the initial implementation cost, or whether an additional customisation fee would be payable, which is dependent upon the complexity of additional development required.

Appendix C: day2day credits

Our unique day2day credits scheme offers a cost-effective means of making minor visual and functional enhancements to your CRB*hub* for Coaching system on an ongoing basis. For example, you may wish to:

– update visual styling or have a new logo applied following an organisation-wide rebranding;
– arrange for a new intake of users to have profiles automatically generated and passwords assigned based on the content of a supplied spreadsheet;
– implement custom functionality, such as specialised filtering, to correspond with a new programme initiative.

day2day credits represent the most cost-efficient way of financing these types of updates. The benefits of purchasing day2day credits packages are twofold:

– delays associated with procurement processes (raising purchase orders, etc) are avoided at the point when the work is needed, so each job can be carried out quickly;
– buying day2day credits as a package saves you money (up to 70% off the comparable one-off cost).

We can of course carry out any one-off updates as required without a credits package in place; however, the figures below illustrate the considerable savings that can be made by investing in a credits package and avoiding the extra administrative expense involved in a series of equivalent small jobs.

The more credits you buy at once, the greater the saving. Purchased credits do not expire as long as the CRB*hub* system remains licensed, and are transferrable by arrangement in the event of organisational change.

Credits included with system purchase and annual licensing

– 5 credits are included with your initial CRB*hub* for Coaching implementation
– 3 credits are included with each annual licensing renewal from year two onwards

Credits included with system purchase and annual licensing expire if not used within one year.